



nbrss

NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM



Success is a journey, not a destination.

-- Ben Sweetland --

NBRSS TODAY

**Supporting Scientific Research
through Business Solutions**

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From our Project Manager...

THE NBS TAKES ITS FIRST STEP!

The NIH Business System (NBS), a part of the NIH Business and Research and Support System (NBRSS), took its first step in October. We began running the General Ledger and Budget modules in concert with the Administrative Database (ADB) – the system that the NBS will ultimately replace.

Who at NIH is impacted?

The NBS will operate in parallel with the ADB for several months, initially impacting only a handful of employees in the Office of Financial Management and in the IC Budget Offices. Although this first step may seem small, implementation of the General Ledger and Budget modules actually represents a significant step forward in the NBS project since it initiates the process of replacing and modernizing NIH's accounting infrastructure. Although at this point in the project most of the changes have occurred “behind the scenes,” the groundwork is being established for the other modules to build upon. As additional components of the NBS are deployed, more people will experience changes in their business practices.

What's next?

The NBS Travel System is scheduled to go-live in the spring of 2003, bringing a web-based environment to the NIH, along with various automated features. The Travel Team and a full complement of support teams are preparing to deliver a system that puts NIH in the forefront of automated travel processing.

Further information about the NBRSS is located on the project website <http://nbrss.nih.gov>. Your questions and comments are most welcome and may be directed to nbrss@mail.nih.gov. Look for our next distribution of *NBRSS Today* in January.

Colleen Barros
Project Manager, NBRSS

What's new?

Our biggest NBS event yet!

Our first NBS Town Hall Meeting was held November 6, 2002 in the Natcher Auditorium. This multimedia communications event attracted 550 administrative and scientific staff members and included opportunities for them to increase their awareness and understanding of the NBS.

The agenda began with a Plenary Session and a discussion of scientific and administrative management perspectives of NBS implementation with the following speakers:

1. *Charles E. Leasure*, Deputy Director for Management & Chief Financial Officer, Office of the Director, NIH, and a Co-Chair, Administrative Management Systems Steering Committee;
2. *Lawrence A. Tabak*, DDS, PhD, Director, National Institute of Dental & Craniofacial Research, NIH, and a Co-Chair, Administrative Management Systems Steering Committee;
3. *Gary G. Christoph*, PhD, Chief Operating Officer and Deputy Director, Center for Information Technology, NIH; and
4. *Colleen Barros*, Executive Officer, National Institute on Aging, NIH, and the NBS Project Manager.

The agenda concluded with a series of concurrent system presentations and/or demonstrations in the functional areas of **Budget/Finance**; **Acquisition** (Requisition to Receipt); and **Travel** (Planning to Approving). Participant survey results showed that the affair was well-received and that folks would attend future NBS activities.

An inside look at the NBS Functional Teams...

Finance...

As the General Ledger and Budget modules of the NBS run in tandem with the ADB, the NBS Project Team is teaching end users how to use the new system. Affected employees in the Office of Financial Management (OFM) were taught both the theory and application of Oracle Financials. Training topics included:

- ✓ Maintaining the NBS and the ADB simultaneously;
- ✓ Entering new Projects (CANs); and
- ✓ Entering the funding budget.

Through close collaboration, the Service and Supply Fund (SSF) and Finance Teams have adapted Oracle *Projects* -- the software application that will ultimately support SSF activities at the NIH -- to facilitate the transition from CANs to Projects. The Teams have developed processes and procedures to support this effort. In October, the Budget Officers learned how to request a new CAN, using the *Project Request Form*. The Finance Team is preparing to support end users as they begin operating the new system.

Travel...

The Travel Team and a host of technical experts are preparing for the early spring 2003 "go live" of the NBS Travel System. The teams are involved in a multitude of activities -- each effort is crucial, and all are happening simultaneously.

<http://nbs.nih.gov>

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In September, members of the Travel Resource and Advisory Teams, as well as many Administrative Officers and IC office support staff, volunteered to test the Travel System's software and review draft training materials. Participant input proved invaluable to the Travel Team, resulting in changes and clarifications to the testing and training materials.

The reality of a new Travel System relies on the closely correlated efforts of functional and technical teams from across the NBS project. Some of their work-in-progress includes:

1. Coordinating the final installation of the system's software;
2. Finalizing the "link" between the new Travel and Finance systems;
3. Facilitating current and future user support of the new system;
4. Launching a training program for thousands of NBS Travel System users;
5. Performing "end to end" test runs of travel transactions; and
6. Managing data collection and reporting from the NBS Travel System.

Property...

In our August 2002 edition of *NBRSS Today*, we indicated that the Property Team was evaluating various property management software applications. We are pleased to announce that the *Sunflower* Assets software package will provide the property management functions for the NBS. Several alternatives were considered during the search; however, *Sunflower* is the only application developed specifically to comply with Federal requirements and Joint Financial Management Improvement Program standards for property management systems. After extensive evaluation, *Sunflower* was determined to offer the best all-around solution for meeting NIH's property management requirements. *Sunflower* has been successfully implemented with Oracle applications in another Federal research environment. In September, the Administrative Management Systems Steering Committee (AMSSC) approved the selection of *Sunflower* for the NBS Property system.

The Property Team and *Sunflower* consultants are revising the schedule for implementing the new Property system. A deployment date for the NBS Property module will be announced after AMSSC approval.

Acquisition, Supply, Research and Development (R&D) Contracts, and Service and Supply Fund (SSF)...

Our other functional teams continue preparing for the future deployment of their respective NBS module. More details will be provided as we approach those go-live dates.

EHRP Project Status...

The NIH successfully deployed the new automated personnel system, the Enterprise Human Resources and Payroll (EHRP) system, on September 9, 2002! Human Resources and Administrative/Management Staff are now entering personnel actions in EHRP.

A variety of job aids for assisting EHRP users with performing specific actions are now available on the NBRSS website: <http://nbrss.nih.gov/JobAids.html>. These reference

materials describe roles, system functions, and specific steps involved in processing personnel actions. The available job aids currently include:

Job Aids for Human Resources & Administrative/Management Staff

- Adjusting the Salary of Employees in Administratively Determined Pay Plans
- Moving Employees From Another Operating Division to NIH (Change in Appointing Office)
- Moving Employees From One IC to Another IC
- New Hire Process
- Position Management Workflow Reference Guide & Job Code/Position Request Form
- Printing SF 50s & SF 52s
- User Account Information

Job Aids for Administrative/Management Staff

- Change in Department Identification (Administrative Code)
- Change in Duty Station
- Create a Job Requisition
- Moving Employees From One IC to Another IC
- Name Changes
- Not to Exceed Actions
- Position Change, Promotions, Change to Lower Grade, & Reassignments/ Conversions
- Queries for Position Management
- Return to Duty
- Separations

Additional job aids are being developed and will be posted to the website in the coming weeks, including: processing realignments, savings bonds, and union dues. EHRP job aids will continue to be updated and new ones created, so please be sure to visit the EHRP website often at <http://nbrss.nih.gov/JobAids.html> for the latest versions.

Need Help with EHRP? Contact TASC by any of the following methods:

- Phone: 6-EHRP (301 496-3477)
- Email: TASC@nih.gov
- Website: <http://support.cit.nih.gov/>

Change Management...

Communications -- *Have you heard?*

✓ The NBS Travel System on display...

- NBS Travel System demonstrations have been presented around the community, including our North Carolina and Baltimore locations.
- Traveler interactions with the NBS Travel System were presented at the 2002 NIH Research Festival.
- NBS Travel System demonstrations were featured at the NBS Town Hall Meeting.

✓ The NBRSS website has a New Look!

Visit our website <http://nbrss.nih.gov> to see our new, sleeker look!

Do you need to keep up-to-date on what's happening with the EHRP?

- ➔ Check out our list of EHRP job aids and updates to your EHRP training/reference manual. (<http://nbrss.nih.gov/ehrp.html>)

Do you work with Property, Travel, or Budget? Do you want to know when the NBS system is going live?

- ➔ Check our NBS Project Timeline! (http://nbs.nih.gov/project_timeline.html)

Do you want to learn more about upcoming NBRSS initiatives or see NBS system demonstrations?

- ➔ Check out the NBRSS Project calendar! (<http://nbrss.cit.nih.gov/scripts/calendar/default.asp>)

Are you wondering about the training that NBS offers?

- ➔ Visit our training page (<http://nbs.nih.gov/training.html>).

Our **calendar** and "**What's New**" section of our home page contain an ever changing list of information describing our current activities for the EHRP and NBS.

Want to know more???

Please contact our project e-mail if you would like an NBRSS team member to address your group nbrss@mail.nih.gov. Look forward to more functionally specific information and demonstrations coming your way in the future.

Training...

Recent training efforts focused on General Ledger and Budget responsibilities for OFM and new Project (CAN) request procedures for the IC Budget community. These training activities were designed to support users with the parallel operation of the NBS and ADB and included student guides and hands-on workshops. Additionally, NBS team members are providing one-on-one coaching to affected staff, as needed. The IC budget community will receive additional training for entering their FY 2003 budgets into the NBS.

October marked the release of the first two steps of our 3-Step NBS Travel Training Program designed to prepare over 2300 NIH travel planners, reviewers, and approvers for deployment of the NBS Travel System. The approach combines self-paced computer-based training (CBT) with instructor-led classroom training. *Step 1* uses a CBT tool to introduce students to the "look and feel" of the new Travel System, while *Step 2* provides the following:

1. A comprehensive hard-copy **Student Guide** with step-by-step instructions for completing basic travel planning and approving transactions -- Structured exercises are included for teaching students how to enter data and process transactions, just like they will in the new Travel system.
2. An interactive **CBT** for navigating through the Student Guide -- The CBT is divided into lessons, providing students the flexibility to complete their training in separate sessions at their own pace. Review questions allow students to periodically check their training progress.

3. A “**Sandbox**” copy of the NBS Travel System software -- Enables students to apply and practice what they are learning in the CBT and Student Guide.

Self-paced training allows students to:

- ✓ Obtain training without leaving their office;
- ✓ Work at their own pace and review the material (as needed);
- ✓ Gain unlimited hands-on practice before coming to class; and ultimately,
- ✓ Receive a richer classroom experience.

After Steps 1 and 2 are completed, students are ready for *Step 3, Lab Day* -- a full day of traditional, instructor-led classroom training covering more advanced NBS Travel system functionality, such as Sponsored Travel and Foreign Travel. Registration for Lab Day is open. Classroom training began November 18th and continues through the end of January.

Second-level approvers and Travelers will be trained in January via job aids and computer-based training tools that are focused on their particular needs in the system.

Workforce Planning...

In our August 2002 edition of *NBRSS Today*, we said that during the “role mapping” process, we map user roles from the current environment to the NBS to identify individuals who should have access to training for the new system. This exercise involves the NBS Project Team working in conjunction with supervisors and functional experts in the affected community. The Change Management Team offered three workshops in August for the Budget and Finance Community and four workshops in September for the Travel Community to assist managers and supervisors in accomplishing the mapping exercise.

- ✓ In this effort, over 300 staff have been mapped for the Finance and Budget Community and over 2,500 staff have been mapped for the core Travel roles. As a result, training has begun for almost all of these users and a small number of Finance and Budget staff members have started using pieces of the NBS Finance/Budget module.

The role mapping process will be conducted for each IC and OD functional office seven to nine months prior to the deployment date for each function.

From CIT: Special Feature... Business Intelligence – A Smart Solution

Megan Hartwell and Lori Gordon, nVision Project Team

The Center for Information Technology (CIT) is engaged in a new initiative known as nVision.

What is the nVision initiative?

If you have been making business decisions based on information from the NIH Data Warehouse, i.e. financial data provided from the data warehouse, you have been using “business intelligence.” The NIH is embarking on a new business intelligence initiative called nVision, NIH’s business intelligence solution. The first release focuses on building a travel business intelligence platform based on data from the NBS Travel System and Oracle’s e-Business Suite that are part of the NBS effort.

What is business intelligence?

Business intelligence integrates business information and turns it into insight that will improve an organization's decision-making capabilities. It enables users to manage information combined from multiple sources for rich analysis. The nVision Solution is an evolution of the NIH Data Warehouse that will provide additional data reporting capability.

What is the goal of the nVision initiative?

The goal of the nVision solution is to integrate data from numerous NIH enterprise systems and allow access to that data through a web-enabled reporting application.

What is the vision of this initiative?

Over the next few years, new nVision business areas will be developed based on the deployment of NBS. These include travel, budget and finance, acquisition and supply, property, service and supply fund, and research and development contracts. Business areas that are not impacted by NBS will eventually be included in the nVision solution as well.

What does this initiative mean for the end user?

As part of the first nVision solution release, users will be able to access travel information, including detailed data required for conducting daily operations as well as high-level information required for travel planning activities. Travel data will be integrated with financial information to offer a complete picture of travel. This information will be accessible via the web through Crystal Enterprise, an industry leading reporting solution.

What is the relationship between nVision and the NBS?

nVision will provide access to data in the NBS and will deliver valuable information for analysis and decision support. In the long-term, nVision will integrate data from numerous NIH enterprise systems.

What is the relationship between nVision and the NIH Data Warehouse?

nVision is a progression of the NIH Data Warehouse and will allow the user to take advantage of important new data available from the NBS and significant new business intelligence technologies. As nVision Travel relies on data entered into NBS's Travel module, there will be a short period of time after Travel goes live where authorized staff may have to go to the NIH Data Warehouse to report on travel orders still open in the ADB.

When will the nVision solution be available to the users?

nVision's first release corresponds to the deployment of the NBS Travel function, which will be available in spring of 2003. Training for nVision Travel will begin in concert with the release of the NBS Travel System.

If you have additional questions regarding the nVision solution, please contact the support team at nVisionSolutionSupport@mail.nih.gov.

<http://nbs.nih.gov>

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